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Partnership for a healthier diet

Annual report 2018

Fafo Paper
2019:29

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Preface

Fafo has been commissioned by the Directorate of Health to evaluate *the Letter of Intent for facilitating a healthier diet*. The agreement is between the health authorities and the food industry. The evaluation includes an annual self-report from the parties who have signed the agreement, and in addition, we will carry out a mid-term and a final evaluation. This memorandum is the second annual report from the project.

We thank the co-ordination group of the letter of intent for the valuable input in the process.

Oslo, 5th November 2019

Anne Hatløy, Ketil Bråthen, Svein Erik Stave and Anne Inga Hilsen

Self-reporting 2018

This annual report is the second in the series of interim reports in Fafo's follow-up evaluation of *the letter of intent on facilitating a healthier diet*, signed by the food industry and the Ministry of Health and Care Services in December 2016.¹ In June 2018, the agreement was extended to include the food service industry. The agreement is valid until 31 December 2021. In addition to an annual self-report from the parties who have signed the agreement, a mid-term and a final evaluation will also be carried out.

The self-reporting covers all priority areas, and it is about cooperation between the parties to reduce the intake of salt, added sugar and saturated fat in the population, and to increase the intake of fruits and berries, vegetables, whole grain products and seafood.

This memorandum presents the results of the annual survey from 2018. The survey was sent to the 97 participants who had signed the agreement in 2018 (see appendix 2). The survey is primarily related to the measures that the participants report that they have completed in 2018, and to their own assessment of the agreement.

Organization of the letter of intent

As described in the annual report for 2017, the letter of intent is organized by the high-level *business group* of the Minister for the Elderly and Public Health. The overall responsibility for coordinating the work on the letter of intent lies with *the coordination group*. This group consists of representatives of the participants:

- 2 representatives from Virke (the Enterprise Federation of Norway)/NorgesGruppen,
- 2 representatives from NHO Service (Norwegian Federation of Service Industries and Retail Trade)/Rema,
- 2 representatives from Coop,
- 1 representative from Sjømat Norge (Norwegian Seafood Federation),
- 1 representative from the Norges Frukt- og Grønnsakgrossisters Forbund (Norwegian Fruit and Vegetable Wholesalers' Association),
- 4 representatives from NHO Mat og Drikke (FoodDrinkNorway)/food and beverage manufacturers,
- 1 representative from NHO Reiseliv (The Norwegian Hospitality Association),
- 1 representative from Virke KBS (kiosk, petrol and service trade industry),
- 2 representatives from the authorities, head of the secretariat meet in the coordination group.

The Directorate of Health is the secretariat for the letter of intent.

¹ https://www.regjeringen.no/globalassets/departementene/hod/folkehelse/20161206_intensjon-savtale_naeringslivet_hod_m_vedlegg.pdf

Methodology

Self-reporting is based on a questionnaire which has been sent to all contract partners. The questionnaire consists of one part addressing each priority area and the measures that have been implemented, as well as one part that includes the participants' assessment of the agreement.

The questionnaire has been prepared by Fafo, and has been presented and approved by the coordination group for the letter of intent.

In April 2019, the questionnaire was sent electronically to all the participants who had signed the agreement in 2018, a total of 97 participants. After three calls from Fafo and one call from the Directorate of Health, 49 responses were received. (see Table 1).

Table 1 Participants and response rate

	Priority area 1 Reduction of salt	Priority area 2 Reduction of sugar	Priority area 3 Reduction of saturated fat	Priority area 4 #MerAv (MoreOf)	Total ¹
Participants who have signed the agreement	60		50	72	85 (97) ²
Evaluations responses 2018	37		28	33	49
Response rate	62%		56%	46%	58%

¹ The participants may have signed one or more priority areas.

² Priority area 2 Reduction of sugar has not been included in the analysis, as several of the participants have left the agreement pending after the tax increase on sugar in the State Budget 2018.

The participants who responded to the survey are very different in size. Measured in total turnover in 2018, the participants who responded to the survey ranged from NOK 5 million to NOK 87 billion. The turnover figures are based on self-reported figures in the survey, as well as available figures obtained from proff.no and the companies' available annual reports. The participants have been divided into four equal groups based on turnover. Each group has a relative weight of 3.76, 0.24, 0.07 and 0.01 respectively. These weights are applied to the results of the implementation of measures, while the results of the attitude questions are unweighted. It is worth noting that there are few respondents in the sample. Responses from a single participant will therefore be given great weight, and the confidence levels for the individual responses are great (these figures are not included in the report).

The participants' actions

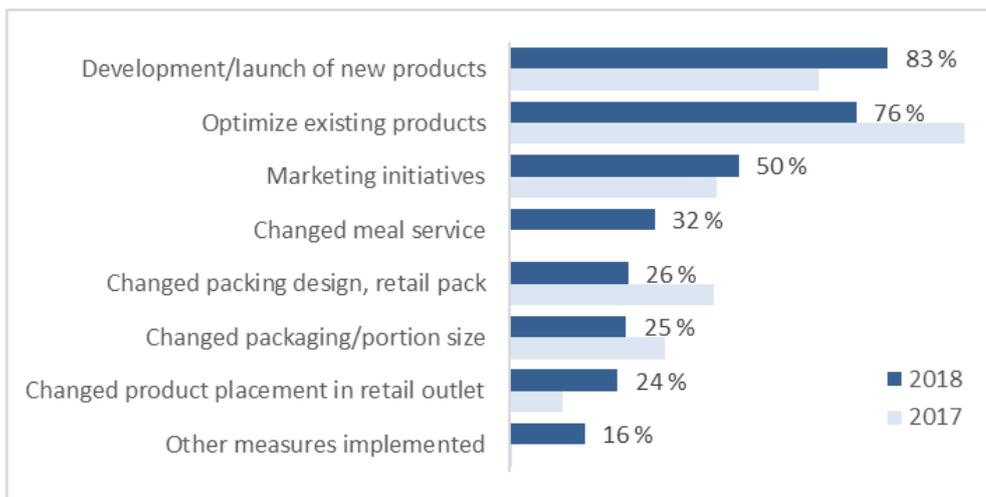
Actions for the individual priority areas

Priority area 1: Reduction of salt content in foods and the reduction of salt intake in the population through the Salt partnership.

- 37 out of 60 participants who signed responded
- 26 with their own goals, 24 measure themselves
- 24 have attended meetings, seminars or workshops during 2018

Development of new products and optimization of existing products are the most frequently reported measures the participants have taken in 2018 to reduce salt (see Figure 1). It is also these two measures that the participants consider to be the most effective. These are the same areas that were highlighted in the 2017 Annual Report.

Figure 1 Actions within priority area 1: Reduction in salt implemented in 2017 (n=29) and 2018 (n=37). *Weighted by total turnover*



Recipe optimization is highlighted as the most effective - especially gradual changes in large volume products. The comments mention that small changes that consumers barely notice can affect habits and preferences over time. By gradually reducing the salt content in order to get consumers accustomed to a less salty taste on familiar products, new and healthier habits can be established. As someone said: "It was relatively easy to implement, and it made little difference to the taste."

Priority area 2: Reduction of added sugar in foods and reduction in the population's intake of added sugar

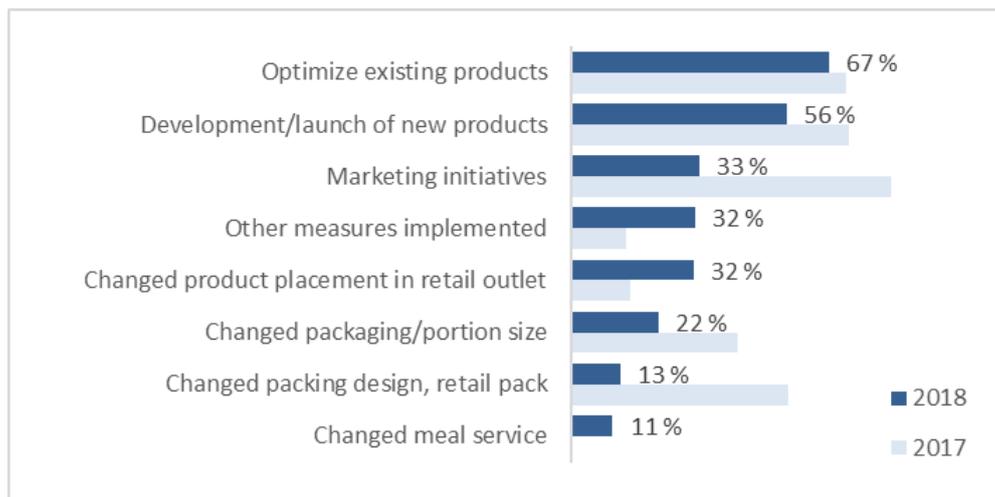
As in the annual report for 2017, the priority area "added sugar" is omitted. This was because many of the agreement participants withdrew from the letter of intent after product taxes on chocolate and sugar confectionery and non-alcoholic beverages increased in the state budget for 2018.²

Priority area 3: Reduction of saturated fat in foods and reduction of the population's intake of saturated fat

- 28 of 50 participants who have signed responded
- 12 with their own goals, all measure themselves
- 18 have attended meetings, seminars or workshops during 2018

As for salt, optimizing existing products and developing new products are also the most important measures in reducing the amount of saturated fat in 2018. Interestingly, marketing measures were the most frequently reported measure in 2017, while they have been greatly reduced in 2018. Based on the reported figures, it is not possible to conclude on what has happened, but it would have been interesting to know if the strong marketing the year before has produced results. Several participants point out that a stronger focus on saturated fat is perceived as important. Some comment that it is possible that this was achieved with last year's marketing and that they could focus on other measures in 2018.

Figure 2 Measures within priority area 3: Reduction in saturated fat carried out in 2017 (n=21) and 2018 (n=28). Weighted by total turnover



² The beverage manufacturers have put a halt on work on the agreement. Other producers have stopped the cooperation on the reduction of added sugar (priority area 2), but the companies are still working individually on sugar reduction. One consequence of the fact that the producers have ceased the cooperation is that they do not report on activities from priority area 2 in this evaluation.

A majority of the participants highlight recipe optimizations the most effective measure - making changes to large volume products while offering alternatives with less saturated fat. At the same time, several actors point out that reduced fat content can affect the properties of the product, and several also mention that if the raw materials of animal origin have too high a saturated fat content, it can present challenges with regard to reduction.

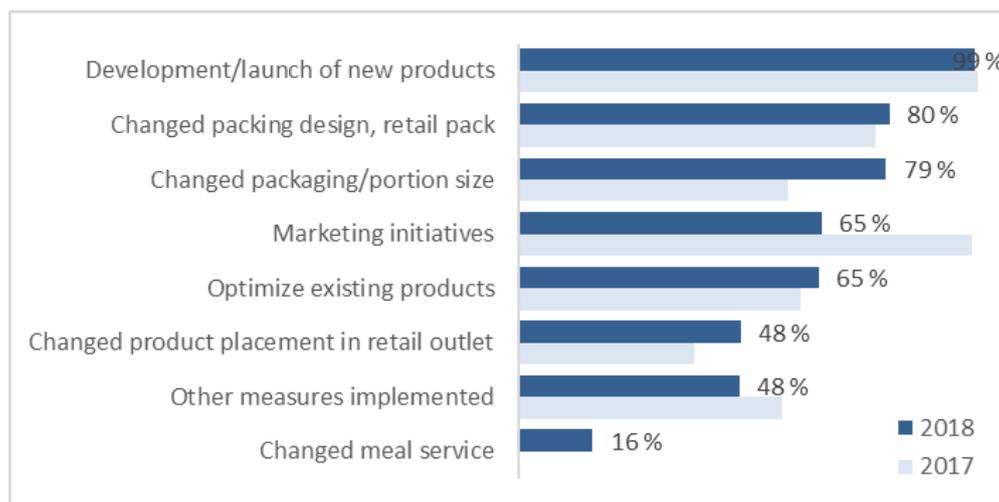
Priority area 4: Increase the population's intake of fruit and berries, vegetables, whole grain products and fish and seafood by 20% by 2021

Fruits, berries and vegetables

- 22 respondents
- 12 with their own goals, 7 measure themselves
- 16 have attended meetings, seminars or workshops during 2018

In contrast to Priority areas 1-3, which all aim to reduce the intake of different nutrients, the three measures within Priority area 4 are about achieving increased intake of different food groups. For the instruments that apply to increased intake of fruits, berries and vegetables, the most important are the development of new products, design change on packaging and changed packaging or portion size. Several mention that changing the packaging size is about smaller packages that are "easy to carry", making it easier therefore to take with you. Marketing measures are still important, but there has been some reduction in the extent of such reported measures since 2017.

Figure 3 Measures within Priority area 4: Increased intake of fruit, berries and vegetables completed in 2017 (n=19) and 2018 (n=22) *Weighted by total turnover*



There is a major focus on fruit and vegetables, with the use of available means at all levels of the value chain. According to some of the open text responses, 2018 was characterized by an exceptionally hot summer and long periods of drought, and this is an important explanation for the decline in volume for fruit and vegetables. Comments were made that delivery challenges for large and volume-driven goods, com-

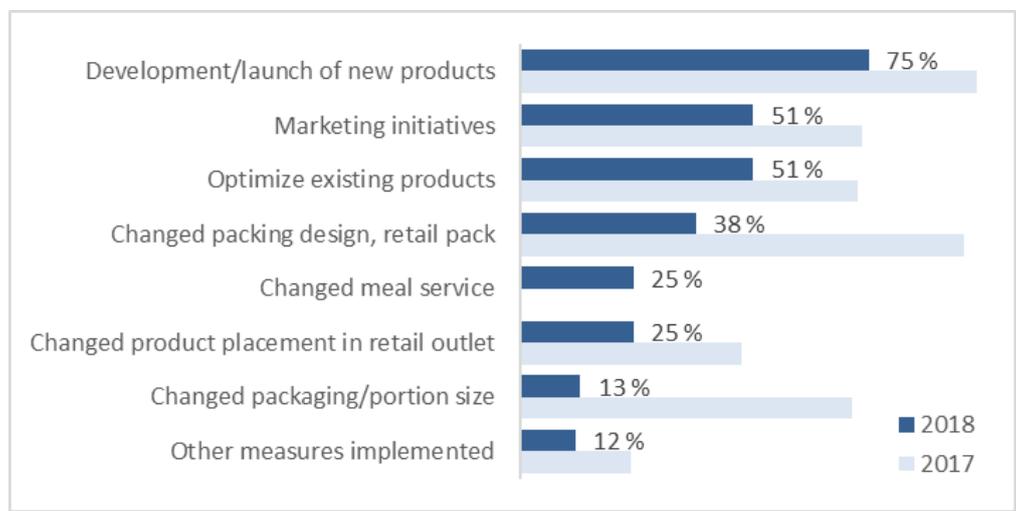
bined with consumers' desires for lightweight solutions in the summer heat, contributed to a clear fall in comparable sales volume. As one participant pointed out, significant growth was seen in finished processed salads weighing little per unit, while large and heavy commodity lines such as onions, carrots and cauliflowers declined, which greatly impacted the overall measurement.

Whole grain products

- 20 respondents
- 6 with their own goals, 5 measure themselves
- 11 have attended meetings, seminars or workshops during 2018

Measures related to increased intake of whole grain foods are particularly related to the development and launch of new products and changes of packaging design and changed packaging or portion size. Here too, marketing is somewhat reduced from 2017, although it still scores high.

Figure 4 Measures within Priority area 4: Increased intake of whole grain foods in 2017 (n=16) and 2018 (n=20) Weighted by total turnover



It is pointed out that new products are being launched that contain more whole grains. Furthermore, some product groups appear to replace some of the meat content with cereals. Experience so far is that the measures are perceived as relevant and implementable, and that this has led to an increased range and sale of whole grains.

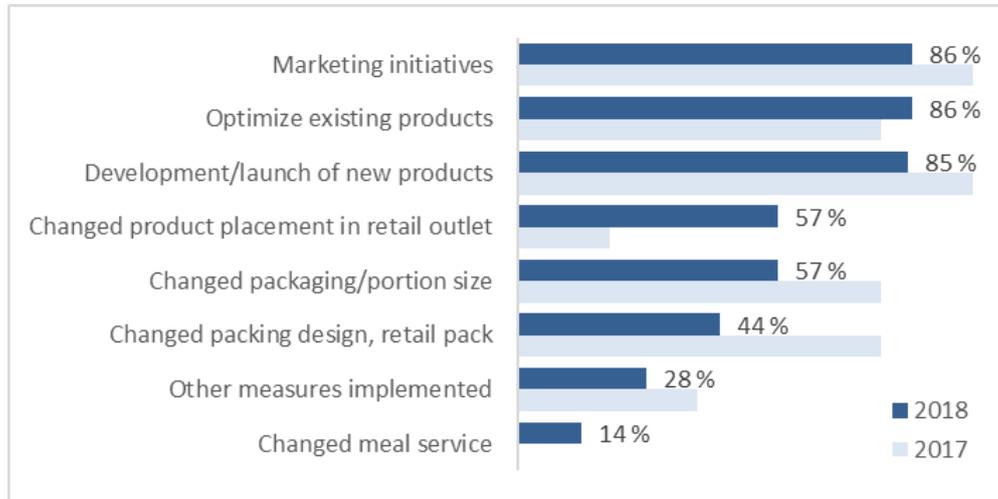
Fish and seafood

- 15 respondents
- 9 with their own goals, 8 measure themselves
- 10 have attended meetings, seminars or workshops during 2018

In 2018, the most important measures to promote increased intake of fish and seafood were the marketing, optimization of existing products and development of new products.

Several examples of new products are highlighted, especially in the category "ready meals" that will make it easier for consumers to choose fish in a busy everyday life.

Figure 5 Measures within Priority area 4: Increased intake of fish and seafood in 2017 (n=14) and 2018 (n=15) Weighted by total turnover



When it comes to product placement, measures were taken such as placing seafood before meat in the warm food section. Several also mentioned that measures such as highlighting fish as a natural choice for grilling have a positive effect.

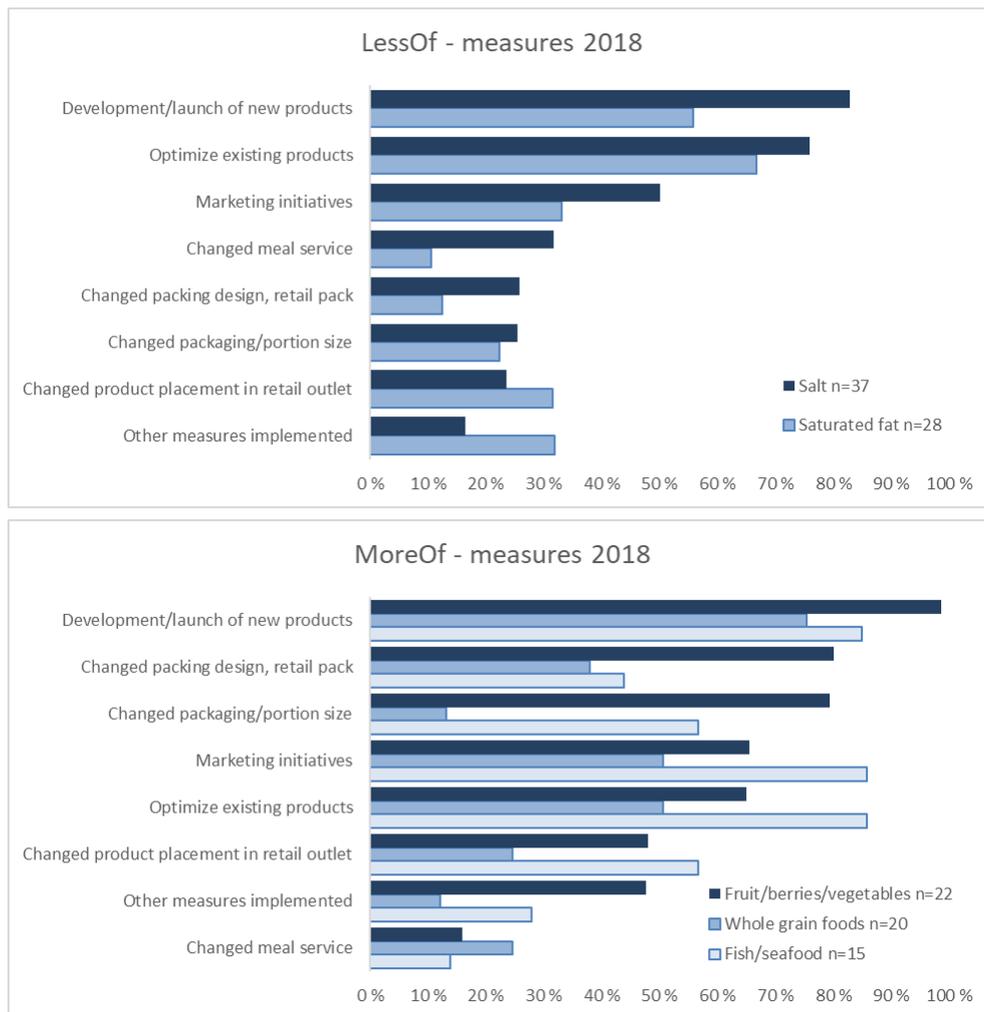
At the same time, challenges were identified with volume loss of unpackaged fish. It was said that this was somewhat, but not fully, offset by an increase in packaged fish. In the open text of the questionnaire it was stated that fish is perceived as expensive and that people have been critical of farmed fish.

The participants measures are summarized

For the measures that are aimed at reducing salt and fat, also called "MindreAv" (LessOf), the most focus is on developing new products and optimizing existing products. Marketing is still important, albeit to a lesser extent than the year before.

For the measures in priority area 4, popularly called "MerAv" (MoreOf), they are most frequently reported related to the development of new products. For fruit/vegetables, change of design on packaging and packaging size is also important, while for fish/seafood, marketing and optimization of existing products are the most frequently reported measures.

Figure 6 Overall overview of measures within all the priority areas. *Weighted based on turnover*



The Keyhole label

Of all the 49 respondents, 19 report that they have products with the keyhole symbol in their 2018 range. Four of these have fewer than 10 products, nine have between 10 and 100, four have between 100 and 1000, and the last two have over 1000 different products with the keyhole symbol.

There are 17 participants with their own keyhole products, with an average of 115 products each (ranked from 2 to 970). In 2018, five participants launched new products with the keyhole symbol. In total, these participants launched 43 such new products.

The participants assessment of the agreement

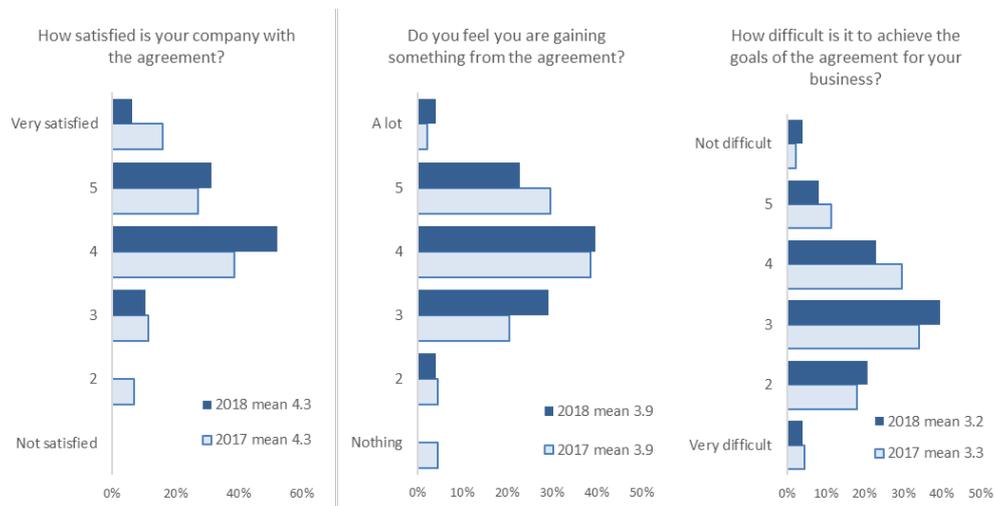
Assessment of the agreement

So far, the participants are largely satisfied with the partnership for a healthier diet. As Figure 7 indicated, most are satisfied with the deal. The average score is 4.3 out of 6, which is the same as for 2017. Nobody says they are not satisfied with the agreement at all.

In terms of whether they feel they are getting something from the agreement, the score is somewhat lower, namely 3.9 - for both years.

The assessment of whether it is difficult or easy to achieve the agreement's goals in their own company, scores are 3.2 on average, about the same as 2017. This is where the greatest potential for improvement is.

Figure 7 Assessment of the agreement 2017 (n=44) and 2018 (n=48) *Not weighted*



Motivation: The main motivation for the participants to take part in the agreement is the wish to contribute to *improved public health*. As one participant described it: "A binding cooperation between the authorities and (...) the industry to provide consumers with healthier choices and thereby improved public health." Several mention that social responsibility is about customers and how to influence their choices in a healthier direction. At the same time, many point out that joining the agreement leads to increased commercial visibility.

Output of the partnership: The elements that are highlighted most frequently that this is a *joint measure*. It is about raising awareness about a healthier diet, both in general and in the individual areas, such as more seafood, less salt, etc. It is also a matter of the industry and the authorities pulling in the same direction.

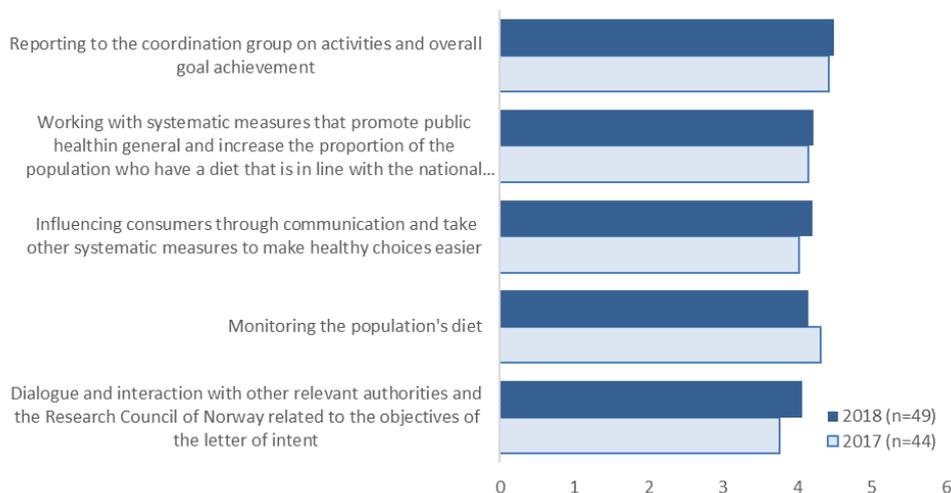
Challenge: There are several factors that are perceived as challenging. Especially the areas "MindreAv" (LessOf) are highlighted, since both fat, salt and sugar affect the taste and consistency of the products. Consequently, it is not only consumer preferences that need to be changed, but the quality of the products must be maintained in terms of consistency, durability, taste etc. Several also point out that they have already made changes, making it more difficult to make further reductions.

Several point out that elements beyond the control of the participants also make it challenging. Some raw materials of animal origin naturally contain a proportion of saturated fat which is challenging to affect in later stages of the food production. It was said that since agriculture is not part of the agreement, there is less potential for influence. The product fees for chocolate and confectionery and non-alcoholic beverages are also mentioned as changes in the framework conditions during the agreement period.

Assessment by the health authorities

We asked for an assessment of the health authorities' work in the partnership. First, we asked respondents to evaluate each area separately. On a scale of 1 to 6, where 6 is very good - the participants give around 4 for the health authorities fulfilling their obligations in all areas. It is reporting to the coordination group on activities and overall goal attainment that scores the highest, while regular dietary studies score the lowest, although the differences are small.

Figure 8 The participants' assessment of how the health authorities are meeting their obligations in 2017 and 2018. 1 = very poor, 6 = very good



We also asked the companies to state what is the most important commitment of the health authorities, from their perspective. They could mark only one option. "Working with systematic measures that promote public health in general and increase the proportion of the population who have a diet that is in line with the national dietary guidelines" is what is considered most important by most. Next is "Influencing consumers through communication and implementing other systematic measures to make it easier to make healthy choices". No one gives top priority to "Report to the coordination group on activities and overall goal achievement".

When they have to prioritize, the answers become clearer than when they answer according to each area individually. At the same time, the answers in each area show that all areas are perceived as important.

Finally, we asked if they had any further comments on the implementation of the letter of intent in 2018. Not many comments were received, but both increased resources in school/kindergarten to influence the direction of a healthy diet, product taxes and reduced VAT on healthy goods were mentioned. It was also stated that the public should take precedence and prioritize quality over price in public agreements.

Main findings

The letter of intent is perceived as important and meaningful by the participants who have entered into the agreement. They report that they are happy with it, they feel they are getting something from the agreement, but they also point out that it can be challenging to succeed.

In general, there seem to be greater challenges associated with the "MindreAv" (LessOf) than the "MerAv" (MoreOf) areas. The challenges of "MindreAv" (LessOf) are not just about changing consumer preferences, consciously or unconsciously, but also about preserving the quality of the products.

"MerAv" (MoreOf) is about developing new products that will make it easy and tempting for consumers to choose the healthier alternatives, but also that the packaging size and design of the packaging will influence consumers. Marketing is important, and it highlights the role of the authorities in promoting healthy choices.

Motivation to join the agreement is clearly linked to the main goal, better public health. Dividends for those who participate are about common spotlight on measures that promote public health, such as raising awareness of a healthier diet and that the industry and the authorities are moving in the same direction.

At the same time, it is challenging that only 49 of the 97 companies that signed the agreement submitted the annual report for 2018. Therefore we know little about how the agreement is working, is perceived and lived up to by about half of the agreement partners. Monitoring is a goal of the agreement, and the annual reports contribute to this. It is therefore a clear challenge to increase reporting during the rest of the agreement period.

Appendix 1: Questionnaire

The letter of intent for a healthier diet

Reporting is voluntary.

The form is assessed according to competition regulations by the Norwegian Directorate of Health.

Business background																									
B1	Business name																								
B2	Location of head office																								
B3	Is your business nationwide or local? <table style="margin-left: 20px;"> <tr> <td>1. Nationwide</td> <td><input type="checkbox"/></td> </tr> <tr> <td>2. Local</td> <td><input type="checkbox"/></td> </tr> </table>	1. Nationwide	<input type="checkbox"/>	2. Local	<input type="checkbox"/>																				
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B4	Total turnover last year (use numbers) <table style="margin-left: 20px;"> <tr> <td><input type="text"/></td><td><input type="text"/></td> </tr> <tr> <td>1. Prefer not to answer</td> <td><input type="checkbox"/></td> </tr> <tr> <td>2. Don't know</td> <td><input type="checkbox"/></td> </tr> </table>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	1. Prefer not to answer	<input type="checkbox"/>	2. Don't know	<input type="checkbox"/>
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B5	Number of employees (use numbers) <table style="margin-left: 20px;"> <tr> <td><input type="text"/></td><td><input type="text"/></td> </tr> <tr> <td>1. Prefer not to answer</td> <td><input type="checkbox"/></td> </tr> <tr> <td>2. Don't know</td> <td><input type="checkbox"/></td> </tr> </table>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	1. Prefer not to answer	<input type="checkbox"/>	2. Don't know	<input type="checkbox"/>
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B6	Type of business <table style="margin-left: 20px;"> <tr> <td>a. Manufacturer</td> <td><input type="checkbox"/></td> </tr> <tr> <td>b. Wholesaler</td> <td><input type="checkbox"/></td> </tr> <tr> <td>c. Agent</td> <td><input type="checkbox"/></td> </tr> <tr> <td>d. Industry organization/health authority</td> <td><input type="checkbox"/></td> </tr> </table> <p><i>Select all that are relevant</i></p>	a. Manufacturer	<input type="checkbox"/>	b. Wholesaler	<input type="checkbox"/>	c. Agent	<input type="checkbox"/>	d. Industry organization/health authority	<input type="checkbox"/>																
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B7	Link to the agreement <table style="margin-left: 20px;"> <tr> <td>a. Priority area 1: Reduction of salt</td> <td><input type="checkbox"/></td> </tr> <tr> <td>b. Priority area 2: Reduction of added sugar</td> <td><input type="checkbox"/></td> </tr> <tr> <td>c. Priority area 3: Reduction of saturated fat</td> <td><input type="checkbox"/></td> </tr> <tr> <td>d. Priority area 4: Increased intake of fruits, berries, vegetables</td> <td><input type="checkbox"/></td> </tr> <tr> <td>e. Priority area 4: Increased intake of whole grain foods</td> <td><input type="checkbox"/></td> </tr> <tr> <td>f. Priority area 4: Increased intake of fish and seafood</td> <td><input type="checkbox"/></td> </tr> </table> <p><i>Select all that are relevant</i></p>	a. Priority area 1: Reduction of salt	<input type="checkbox"/>	b. Priority area 2: Reduction of added sugar	<input type="checkbox"/>	c. Priority area 3: Reduction of saturated fat	<input type="checkbox"/>	d. Priority area 4: Increased intake of fruits, berries, vegetables	<input type="checkbox"/>	e. Priority area 4: Increased intake of whole grain foods	<input type="checkbox"/>	f. Priority area 4: Increased intake of fish and seafood	<input type="checkbox"/>												
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e. Priority area 4: Increased intake of whole grain foods	<input type="checkbox"/>																								
f. Priority area 4: Increased intake of fish and seafood	<input type="checkbox"/>																								

Priority area 1: Reduction of salt

[Only to be answered by those who have checked B7a on page 1]

SA1	Have you set your own goals for salt reduction?	1: Yes 2: No→SA4
SA2	Do you monitor the development of the salt reduction targets yourself?	1: Yes 2: No→SA4
SA3	How often is it measured?	1: Monthly or more often 2: Quarterly 3: Biannually 4: Annually 5: Other.....
SA4	Has your company implemented any of the following measures in relation to <i>Priority area 1: Reduction of salt</i> within the agreement in 2018?	
a	Development and launch of new product(s)	1: Yes 2: No 3: Not applicable
b	Optimizing existing product(s)	1: Yes 2: No 3: Not applicable
c	Changed packaging or portion size (intended to influence healthier choices)	1: Yes 2: No 3: Not applicable
d	Change of packaging design, retail pack (intended to influence healthier choices)	1: Yes 2: No 3: Not applicable
e	Marketing initiatives	1: Yes 2: No 3: Not applicable
f	Changed product placement in retail outlets (intentionally influencing healthier choices)	1: Yes 2: No 3: Not applicable
g	Other measures implemented	1: Yes 2: No
	<i>If yes, please describe</i>	.....
SA5	What was the most effective measure you took in 2018?	.....
SA6	Why was this measure effective?	.....
SA7	Has anyone from your company attended meetings/seminars/workshops within Priority area 1: Reduction of salt during 2018?	1: Yes 2: No 3: Not applicable

Priority area 2: Reduction of added sugar

[Only to be answered by those who have ticked B7b on page 1]

SU1	Have you set your own goals for reducing added sugar?	1: Yes 2: No → SU4
SU2	Do you monitor progress in relation to the goals of reducing added sugar?	1: Yes 2: No → SU4
SU3	How often are they measured?	1: Monthly or more often 2: Quarterly 3: Biannually 4: Annually 5: Other
SU4	Has your company taken any of the following measures in connection with <i>Priority area 2</i> within the agreement in 2018?	
a	Development and launch of new product(s)	1: Yes 2: No 3: Not applicable
b	Optimizing existing product(s)	1: Yes 2: No 3: Not applicable
c	Changed packaging or portion size (intentionally affecting healthier choices)	1: Yes 2: No 3: Not applicable
d	Change of packaging design, retail pack (intended to influence healthier choices)	1: Yes 2: No 3: Not applicable
e	Marketing initiatives	1: Yes 2: No 3: Not applicable
f	Changed product placement in retail outlets (intentionally influencing healthier choices)	1: Yes 2: No 3: Not applicable
g	Other measures implemented within "Priority area 2: Reduction of added sugar" last year?	1: Yes 2: No
	<i>If yes, please describe</i>	.....
SU5	What was the most effective measure you implemented in 2018?	.....
SU6	Why was this measure effective?	.....
SU7	Has anyone from your company participated in meetings/seminars/workshops for Priority area 2: Reduction of added sugar during 2018?	1: Yes 2: No 3: Not applicable

Priority area 3: Reduction of saturated fat

[Only to be answered by those who have ticked B7c on page 1]

FE1	Have you set your own goals for reducing saturated fat?	1: Yes 2: No → FE4
FE2	Do you monitor the development in relation to the goals for reducing saturated fat yourself?	1: Yes 2: No → FE4
FE3	How often is it measured?	1: Monthly or more often 2: Quarterly 3: Biannually 4: Annually 5: Other
FE4	Has your company taken any of the following measures in relation to <i>Priority area 3</i> within the agreement in 2018?	
a	Development and launch of new product(s)	1: Yes 2: No 3: Not applicable
b	Optimizing existing product(s)	1: Yes 2: No 3: Not applicable
c	Changed packaging or portion size (intentionally affecting healthier choices)	1: Yes 2: No 3: Not applicable
d	Change of packaging design, retail pack (intentionally affecting healthier choices)	1: Yes 2: No 3: Not applicable
e	Marketing initiatives	1: Yes 2: No 3: Not applicable
f	Changed product placement in retail outlets (intentionally influencing healthier choices)	1: Yes 2: No 3: Not applicable
g	Other measures implemented within "Priority area 3: Reduction of saturated fat" last year? <i>If yes, please describe</i>	1: Yes 2: No
FE5	What was the most effective measure you implemented in 2018?	.....
FE6	Why was this measure effective?	.....
FE7	Has anyone from your company participated in meetings/seminars/workshops within Priority area 3: Reduction of saturated fat during 2018?	1: Yes 2: No 3: Not applicable

Priority area 4: Increased intake of fruits, berries, vegetables

[Only to be answered by those who have ticked B7d on page 1]

FG1	Have you set your own goals for increasing the intake of fruit, berries and vegetables?	1: Yes 2: No→FG4
FG2	Do you monitor the development in relation to the goals of increased intake of fruits, berries and vegetables?	1: Yes 2: No→FG4
FG3	How often is it measured?	1: Monthly or more often 2: Quarterly 3: Biannually 4: Annually 5: Other
FG4	Has your company taken any of the following measures in relation to <i>Priority area 4: Increased intake of fruits, berries, vegetables</i> within the agreement in 2018?	
a	Development and launch of new product(s)	1: Yes 2: No 3: Not applicable
b	Optimizing existing product(s)	1: Yes 2: No 3: Not applicable
c	Changed packaging or portion size(intentionally affecting healthier choices)	1: Yes 2: No 3: Not applicable
d	Change of packaging design, retail pack (intentionally affecting healthier choices)	1: Yes 2: No 3: Not applicable
e	Marketing initiatives	1: Yes 2: No 3: Not applicable
f	Changed product placement in retail outlets (intentionally influencing healthier choices)	1: Yes 2: No 3: Not applicable
g	Other measures implemented within "Priority area 4: Increased intake of fruits, berries, vegetables" last year? <i>If yes, please describe</i>	1: Yes 2: No
FG5	What was the most effective measure implemented in 2018?	.....
FG6	Why was this measure effective?	.....
FG7	Has anyone from your company participated in meetings/seminars/workshops within Priority area 4: Increased intake of fruits, berries, vegetables during 2018?	1: Yes 2: No 3: Not applicable

Priority area 4: Increased intake of whole grain foods

[Only to be answered by those who have ticked B7e on page 1]

KO1	Have you set your own goals for increasing the intake of whole grain foods?	1: Yes 2: No→KO4
KO2	Do you monitor developments in relation to the goal of increasing the intake of whole grain foods?	1: Yes 2: No→KO4
KO3	How often is it measured?	1: Monthly or more often 2: Quarterly 3: Biannually 4: Annually 5: Other
KO4	Has your company taken any of the following measures in relation to <i>Priority area 4: Increased intake of whole grain foods</i> within the agreement in 2018?	
a	Development and launch of new product(s)	1: Yes 2: No 3: Not applicable
b	Optimizing existing product(s)	1: Yes 2: No 3: Not applicable
c	Changed packaging or portion size(intentionally affecting healthier choices)	1: Yes 2: No 3: Not applicable
d	Change of packaging design, retail packk (intentionally affecting healthier choices)	1: Yes 2: No 3: Not applicable
e	Marketing initiatives	1: Yes 2: No 3: Not applicable
f	Changed product placement in retail outlets (intentionally influencing healthier choices)	1: Yes 2: No 3: Not applicable
g	Other measures implemented within "Priority area 4: Increased intake of whole grain foods" last year? <i>If yes, please describe</i>	1: Yes 2: No
KO5	What was the most effective measure implemented in 2018?	.....
KO6	Why was this measure effective?	.....
KO7	Has anyone from your company participated in meetings/seminars/workshops within Priority area 4: Increased intake of whole grain foods during 2018?	1: Yes 2: No 3: Not applicable

Priority area 4: Increased intake of fish and seafood

[Only to be answered by those who have ticked B7e on page 1]

F11	Have you set your own goals for increasing the intake of fish and seafood?	1: Yes 2: No→F14
F12	Do you monitor your own development in relation to the goal of increasing the intake of fish and seafood?	1: Yes 2: No→F14
F13	How often is it measured?	1: Monthly or more often 2: Quarterly 3: Biannually 4: Annually 5: Other
F14	Has your company taken any of the following measures in relation to <i>Priority area 4: Increased intake of fish and seafood</i> within the agreement in 2018?	
a	Development and launch of new product(s)	1: Yes 2: No 3: Not applicable
b	Optimizing existing product(s)	1: Yes 2: No 3: Not applicable
c	Changed packaging or portion size(intentionally affecting healthier choices)	1: Yes 2: No 3: Not applicable
d	Change of packaging design, retail pack (intentionally affecting healthier choices)	1: Yes 2: No 3: Not applicable
e	Marketing initiatives	1: Yes 2: No 3: Not applicable
f	Changed product placement in retail outlets (intentionally influencing healthier choices)	1: Yes 2: No 3: Not applicable
g	Other measures implemented within "Priority area 4: Increased intake of fish and seafood" last year? <i>If yes, please describe</i>	1: Yes 2: No
F15	What was the most effective measure implemented in 2018?	.....
F16	Why was this measure effective?	.....
F17	Has anyone from your company participated in meetings/seminars/workshops within Priority area 4: Increased intake of fish and seafood during 2018?	1: Yes 2: No 3: Not applicable

The keyhole symbol

NO1	Total number of products with the keyhole symbol in 2018	<input type="text"/> <input type="text"/> <input type="text"/>
		Don't know; Not applicable
NO1b	How many products in the entire range are the company's own brands? (use numbers)	<input type="text"/> <input type="text"/> <input type="text"/>
		Don't know; Not applicable
NO2	Number of new products with the keyhole symbol in 2018	<input type="text"/> <input type="text"/> <input type="text"/>
		Don't know; Not applicable
NO2b	How many of the new products in 2018 were the company's own brands? (use numbers)	<input type="text"/> <input type="text"/> <input type="text"/>
		Don't know; Not applicable

The participants' assessment of the agreement

AV1	How satisfied is your company with the agreement? <i>1 = Not satisfied at all</i> <i>6 = Very satisfied</i>	1 2 3 4 5 6
AV2	Do you feel you are gaining something from the agreement? <i>1 = Haven't gained anything from the agreement</i> <i>6 = Have gained a lot from the agreement</i>	1 2 3 4 5 6
AV3	What do you think you have gained the most from?	.....
AV4	How difficult is it for your company to achieve the goals of the agreement? <i>1 = Very difficult</i> <i>6 = Very easy</i>	1 2 3 4 5 6
AV5	What is particularly challenging	.....
AV6	What kind of measures give the best result?	.....
AV7	What is your main motivation for joining the agreement?	.....

The participants' assessment of the health authorities

AV9 What measures significant to your business do you feel that *the health authorities* have taken in relation to the agreement during 2018?
None; Not applicable

AV10 What measures significant to the entire agreement do you feel that *the health authorities* have taken during 2018?
None; Not applicable

AV11 How well do you think *the health authorities* fulfil their obligations within the following fields?

1= *Very badly*
6= *Very well*
9= *Don't know*

a.	Monitoring the population's diet	1	2	3	4	5	6	9
b.	Obtaining data to evaluate the performance of this agreement and working towards its implementation	1	2	3	4	5	6	9
c.	Fielding regular representative dietary surveys	1	2	3	4	5	6	9
d.	Working with systematic measures that promote public health in general and increase the proportion of the population who have a diet that is in line with the national dietary advice. Having a special focus on children and young people	1	2	3	4	5	6	9
e.	Reporting to the coordination group on measures and overall goal achievement	1	2	3	4	5	6	9
f.	Influencing consumers through communication and taking other systematic measures to make healthy choices easier	1	2	3	4	5	6	9
g.	Participating in dialogue and interaction with other relevant authorities and the Research Council related to the objectives of the letter of intent.	1	2	3	4	5	6	9

AV12 From your business perspective, what is the most important commitment for the *health authorities* (of those mentioned above)

Tick only one

a b c d e f g

To conclude:

AV31 Do you have any further comments on the implementation of the Letter of Intent in 2018?
None

Appendix 2 List of all participants in 2018³

A. Nilsson & Co AS	Kolonial.no AS
A/S Nestlé Norge	Lantmännen Unibake
AS Pals	Leiv Vidar AS
Bakehuset AS	Lerøy Seafood Group
Baker Brun AS	Lunde Gård engros AS
Bama	MAARUD AS
Barilla Norge AS	Matbørsen AS
Best Stasjon AS	Mesterbakeren AS
BKLF AS	Meum Frukt & Grønt AS
Brynild Gruppen	Mills AS
Brødrene Karlsen AS	Mondelez Norge AS
Brødrene Raastad AS	NHO Mat og Drikke
Cater Mysen AS	NHO Reiseliv
Cernova	NHO Service og Handel
Circle K Norge AS	Norfesh AS
Coop Norge SA	Norges frukt- og grønnsaksgrossisters forbund
Coor Service Management AS	NorgesGruppen ASA
Den Stolte Hane AS	NorgesGruppen Servicehandel AS
Det Glutenfrie Verksted	Norgesmøllene AS
Diplom-Is AS	Norrek Dypfrys AS
Domstein Sjømat AS	Nortura SA
Duga AS	Nærbakst AS
Engrosfrukt AS	Odd Langdalen frukt og engros AS
Eugen Johansen AS	Orkla ASA
Fatland Jæren AS	Pelagia AS
Findus Norge AS	REMA 1000
Finsbråten AS	Rolf Olsen Engros AS
Finstad Gård Engros AS	Salatmestern AS
Fjordland AS	Salmon Brands AS
Gartnerhallen AS	Scandic Hotels AS
Germann Vervik efit AS	Servicegrossistene AS
Grilstad AS	Sjømat Norge
H. A. Brun AS	ST1 Norge AS
Hennig Olsen Is	Svanøy Røykeri AS
Hoff SA	Synnøve Finden AS
Holmens AS	T.L. Måkestad AS
Huseby Gård Da	TINE SA
Ingebrigtsen kjøtt AS	Toma Facility Services AS
Insula AS	Toma Mat AS
Interfrukt AS	Umoe Restaurants AS
ISS Facility Services AS	United Bakeries Norway AS
JÆDER Ådne Espeland AS	Virke
Kavli Norge AS – O. Kavli AS	Virke KBS
Kavli Norge AS – Q-Meieriene AS	YX Norge AS
King Oscar AS / Thai Union	Økern Engros

³ Participants who had signed only priority area 2: Reduction of added sugar, is not included.

Partnership for a healthier diet

In December 2016, the food industry and the Norwegian Ministry of Health and Care Services signed the Letter of intent for facilitating a healthier diet. The goal is to achieve a more comprehensive and overall collaboration between the health authorities and the food industry in order to make it easier for the consumer to make healthier choices.

Fafo is commissioned by the Directorate of Health to evaluate the agreement. The evaluation includes an annual self-report from the parties who have signed the agreement. This paper is the second annual report from the project.



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